

FCSI Sample Tool to Provide Record of Industry Contribution (IC) Activity

Below are **samples** of how the Industry Contribution tracking tool can be used and some **examples** of the types of activities that would be recognized as satisfying the requirement. Keep in mind that Fellows have the opportunity to define for themselves which of their professional experiences represent a meaningful contribution to the financial services industry within the broad categories.

Sample: Bob Smith

Date of Activity	Category	Type of Activity	Number of Hours	Number of Hours YTD
April 25, 2013	Betterment of the Industry	Junior Achievement – taught Dollars with Sense program at York Public School	Up to 12 hours	12 hours

Sample: Ruth Weber

Date of Activity	Category	Type of Activity	Number of Hours	Number of Hours YTD
October 12, 2013	Charitable Work	Helped my company with their United Way Campaign	8 hours	8 hours
April 15, 2013 December 8, 2013	Mentoring	Had two onboarding meetings with recently hired staff within my company to introduce them to the job and the firm	2 hours	10 hours
November 15, 2013	Mentoring	Participated in a career day at the local University helping advise students as to different career options within my organization	2 hours	12 hours

Sample: Kerry Winder

Date of Activity	Category	Type of Activity	Number of Hours	Number of Hours YTD
May 7, 2013	Industry Advocacy	Wrote and delivered a presentation to the Rotary Club on the ‘Importance of the Financial Services’	6 hours	6 hours
August 8, 2013	Betterment of Industry	Participated in a CSI panel	5 hours	11 hours
September 30, 2013	Betterment of Industry	Completed the CSI Customer Satisfaction and Loyalty Survey to provide feedback to CSI on the quality of its course offerings	1 hour	12 hours